AUGUST 3, 1987

CableVision

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INFORMATION AND ANALYSIS FOR CABLE TELEVISION MANAGEMENT

STOCKS RIDE UPTURN TO NEW HIGHS

CASH-STARVED STATES EYE CABLE FOR NEW REVENUE

HBO ADDS 'NEW MOVES' TO FALL MARKETING

OPENING VOLLEYS FIRED IN SYNDEX WAR

COURT UPHOLDS CABLE DEREGULATION

AT THE MOVIES WITH TCI: CAN CABLE AND THEATERS CO-STAR?

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FRONTLINE

The syntax of syndex 12
Opening salvos are fired as the FCC begins its long-awaited proceeding aimed at restoring some form of programming syndicated exclusivity. And the battle immediately gets personal.

New programming on dislay 13
TV critics from around the country are shown new cable programming for the fall season, and in the view of one of them, it looks like more of the same.

Cable stocks soar 16
A rising market is lifting the boats of most cable stocks, with several issues hitting record highs.

Cable LPs skyrocket 18
The value of cable limited partnerships soared to $350 million in 1987's first half, up 288 percent from a year ago to outpace all other kinds of LPs.

Departments

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Paramount goes to HBO 22
The smoke finally cleared from the battle over rights to Paramount films, and it was HBO emerging with 85 future flicks in hand. The development presents an odd twist in the film exclusivity wars.

MARKETING

A 'Super Season' ahead 30
HBO steps into the major leagues of direct mail marketers this fall when it launches "Super Season," a promotion that will reach 90 percent of all homes and be supported by 1 million telemarketing calls.

Raise the roof to find out what's going on in this house
BONUS TICKET/#1
HBO's special offer is sounding better and better...
FRONT ROW TICKETS

LAW AND REGULATION

Cable deregulation survives 37
The centerpiece of cable deregulation—a determination by the FCC that the availability of three TV stations in a market is sufficient to trigger deregulation of cable rates—has largely been upheld by the U.S. Court of Appeals in Washington. But the court did put a dent in cable's deregulation armor.

FORUM

L.O. is OK 33
Often neglected by many operators, local programming can go a long way to enhancing a system's public image as well as improving revenues, contends one executive with experience in the field.

BUSINESS

The tax man cometh 44
Cable's high profile of late has brought many good things, but now that visability may be backfiring. Many states are putting the arm on cable operators and other service industries to help replenish dwindling coffers.

COVER STORY

A look at UACI 40
When TCI went after UACI, it really was after the cable properties. But TCI is staying at the movies and exploring the synergies flowing from dominance in both cable and theater exhibition. Is this the shape of things to come in media diversification?
—photo by Candace Drake

CABLE STATS

Cable Industry Growth Chart

YEAR	TVHH	Homes Passed	Basic Subscribers	% of TVHH	Pay Subscribers	% of TVHH
1990E	93,900,000	81,783,000	50,706,000	54	32,959,000	35
1989E	92,800,000	79,109,000	48,256,000	52	30,883,000	33
1988E	91,000,000	75,833,000	45,500,000	50	28,665,000	32
1987E	89,300,000	72,460,000	42,725,000	48	26,022,000	29
1986	87,800,000	69,632,000	41,772,000	47	24,101,000	27
1985	86,304,000	64,571,000	36,120,000	42	21,672,000	25
1984	84,600,000	59,989,000	32,994,000	39	19,764,000	23
1983	83,500,000	53,641,000	30,300,000	36	17,877,000	21
1982	82,800,000	49,100,000	28,200,000	34	15,898,000	19
1981	80,700,000	44,000,000	22,596,000	28	11,804,000	15
1980	77,800,000	37,300,000	18,672,000	24	7,780,000	10
1979	76,300,000	32,700,000	16,023,000	21	5,341,000	7
1978	74,500,000	27,200,000	14,155,000	19	2,980,000	4
1977	73,300,000	24,894,000	13,194,000	18	1,466,000	2
1976	71,114,000	21,989,000	12,094,000	17	505,000	1
1975	69,600,000	19,900,000	11,136,000	16	N/A	N/A

Source: CableProFile Data Base, INTERNATIONAL COMMUNICATIONS RESEARCH.

Cable barometer

Television households (TVHH) 87,800,000
Homes passed by cable (HP) 69,632,000
Percent of TVHH passed by cable 79.3%
Basic cable subs 41,772,000
Percent of TVHH with basic cable 47.5%
Percent of HP with basic cable 59.9%
Pay cable subs 24,101,000
Percent of TVHH with pay cable 27.4%
Percent of HP with pay cable 34.6%
Percent of basic subs with pay cable 57.6%

Satellite lineup

Satcom III-R (RCA Americom)

	Transponder
Arts & Entertainment	24
BET	20
Cable Radio Network	4
Cable Value Network	12
Cinemax (West)	23
ESPN (Blackout)	7
Electra	6
Eternal Word Television Network	18
Financial News Network	4
Genesis Storytime	3
HBO (West)	13
Home Shopping Network	22
The Learning Channel	2
Lifetime	17
MTV	11
National Jewish Television	18
Nickelodeon	1
PTL	2
QVC Network	8
Reuter Monitor Service	18
Showtime (West)	10
Tempo Sound	6
Tempo Television	6
Tempo Text	6
The Travel Channel	16
Trinity Broadcasting Network	3
TV Decisions	24
USA Network (West)	9
Video Hits One	15
Viewer's Choice	5
The Weather Channel	19

Satcom IV (RCA Americom)

	Transponder
Alternate View Network	10
American Movie Classics	10
Biznet	6
Bravo	2
Consumer Discount Network	20, 24
Hit Video USA	18
Home Shopping Network 2	1
Home Sports Entertainment	11
Home Team Sports	22
Liberty Broadcasting Network	7
Madison Square Garden	6
The Motivation Network	3
National Black Network	19
New England Sports Network	13
Nickelodeon (West)	4
Nostalgia Channel	21
The Playboy Channel	24
Prime Ticket	20
The Silent Network	23V
SportsChannel-New England	23
SportsVision	9
WPIX—New York	19

Westar III (Western Union)

	Transponder
CNN	5

Westar IV (Western Union)

	Transponder
Atlantic City Horse Racing	6
Cable News Network (CNN)	16
Catholic Telecommunications Network of America	11
National Christian Network	2
International Television Network	10D
Public Broadcasting Service	15, 17, 21, 23
Texas State Network	2
Word of Faith Satellite Network	6

Westar V (Western Union)

	Transponder
Fantasy Unrestricted Network (FUN)	24
FUN Weekend Pay-per-view	24
Moody Broadcasting Network	7D
Pro-Am Sports System (PASS)	14
The University Network	2
Zephyr Weather Information Service	7D

Telstar 303 (AT&T)

	Transponder
American Extasy	19
Country Music Television (CMTV)	13
KTVT (Dallas)	22
SelecTV	13

Galaxy I (Hughes)

	Transponder
CBN Cable Network	11
Cinemax (East)	19
CNN	7
C-SPAN	13
The Discovery Channel	22
The Disney Channel (East)	4
(West)	24
Electra	18
EPG	3
ESPN	9
GalaVision	20
HBO (East)	23
Headline News	8
The Movie Channel (East)	10
(West)	14
The Nashville Network	2
PTL	17
Request Television	12
Seeburg Adult Contemporary	3
Seeburg Contemporary Instrumental	3
Showtime (East)	5
SIN	6
Tempo Text	18
USA Network (East, Central)	21
Viewer's Choice 2	16
WGN	3
WOR-TV	15
WTBS	18

Galaxy III

	Transponder
The Meadows Racing Network	17
National Shopping Club	23
Sky Merchant	11

Spacenet I (GTE)

	Transponder
ACTS	15

Note: A company name in parentheses following a service or network designates the transponder owner. Source: International Thomson Communications Inc.

Top 100 MSOs

Rank	Multiple system operator	Basic subs	
1.	Tele-Communications Inc.	4,200,000	(4/87)
2.	American Television and Communications Corp.	2,888,957	(3/87)
3.	Continental Cablevision	1,456,000	(1/87)
4.	Storer Cable Communications	1,392,000	(2/87)
5.	Cox Cable Communications	1,371,731	(3/87)
6.	Warner Cable Communications Inc.	1,341,613	(6/87)
7.	Comcast	1,258,242	(5/87)
8.	United Cable	1,086,457	(4/87)
9.	Newhouse Broadcasting	1,024,948	(3/87)
10.	Heritage Communications Inc.	1,010,717	(5/87)
11.	Viacom Cablevision	996,000	(6/87)
12.	Jones Intercable	924,857	(6/87)
13.	Times Mirror Cable Television Inc.	847,009	(1/87)
14.	Sammons Communications Inc.	826,581	(5/87)
15.	UA Cablesystems Corp.	771,278	(5/87)
16.	Cablevision Systems Corp.	707,800	(5/87)
17.	Paragon Cable	632,000	(5/87)
18.	Century Communications Corp.	600,000	(12/86)
19.	Rogers Cablesystems Inc.	535,207	(2/87)
20.	Daniels & Associates	529,762	(4/87)
21.	Cable Vision Industries	510,100	(5/87)
22.	Telecable Corp.	497,145	(3/87)
23.	Centel Cable	493,765	(4/87)
24.	American Cablesystems Corp.	455,467	(5/87)
25.	Cooke Cablevision	435,000	(2/87)
26.	Adelphia Communications	434,473	(4/87)
27.	Scripps-Howard	380,000	(6/87)
28.	Falcon Cable	379,000	(2/87)
29.	Post-Newsweek	372,344	(4/87)
30.	Wometco Cable TV Inc.	336,820	(1/87)
31.	TCA Group	328,071	(4/87)
32.	Prime Cable Corp.	325,865	(3/87)
33.	Multimedia Cablevision	298,112	(6/87)
34.	Tele-Media	285,300	(3/87)
35.	Colony Communications Inc.	259,229	(4/87)
36.	Maclean Hunter Cable TV Ltd.	250,215	(2/87)
37.	Rifkin & Associates	250,000	(4/87)
38.	Lenfest Group	239,825	(6/87)
39.	Western Communications	238,215	(4/87)
40.	Communications Service Inc.	210,000	(12/86)
41.	Service Electric Cable TV Inc.	195,000	(3/87)
42.	TCI-Taft	191,915	(5/87)
43.	TKR Cable Co.	190,417	(4/87)
44.	Cencom Cable	173,042	(5/87)
45.	Hauser Communications Inc.	170,000	(6/87)
46.	Adams-Russell Communications	159,306	(3/87)
47.	Harte-Hanks Communications	153,119	(4/87)
48.	Harron Communications	151,902	(3/87)
49.	Greater Media	146,951	(4/87)
50.	Media General Inc.	146,028	(4/87)
51.	Sutton Capital Corp.	145,475	(4/87)
52.	Marcus Communications	141,052	(3/87)
53.	Armstrong Utilities	138,651	(3/87)
54.	Palmer Communications	137,936	(5/87)
55.	Televents Inc.	129,801	(2/87)
56.	Blade Communications	128,378	(4/87)
57.	Essex Communications Corp.	124,308	(4/87)
58.	Summit Communications	118,134	(4/87)
59.	U.S. Cable Corp.	114,486	(5/87)
60.	First Carolina Communications Inc.	114,104	(1/87)
61.	Simmons Communications	110,892	(4/87)
62.	Multi-Channel TV Cable Inc.	109,822	(2/87)
63.	Sonic Communications	109,240	(5/87)
64.	Columbia International	107,078	(3/87)
65.	Booth Communications	104,376	(5/87)
66.	Bresnan Communications Co.	104,136	(4/87)
67.	Northland Communications	103,550	(1/87)
68.	King Videocable	102,000	(3/87)
69.	Scott Cable Communications	98,886	(4/87)
70.	M.L. Media Partners	98,165	(4/87)
71.	Susquehanna Broadcasting	90,923	(3/87)
72.	McDonald Group	90,079	(8/84)
73.	Midcontinent Cable Systems Co.	88,104	(3/87)
74.	Jones Communications	87,533	(2/87)
75.	WEHCO Video	87,448	(3/87)
76.	United Video Management	80,171	(2/87)
77.	Pencor Services	79,028	(3/87)
78.	Omega Communications	77,626	(1/87)
79.	Selkirk Communications	66,581	(5/87)
80.	C4 Media Corp.	64,719	(3/87)
81.	Wisconsin Cablevision and Radio Co.	63,425	(3/87)
82.	Acton Corp.	60,035	(1/87)
83.	Mountain Cable Co.	58,626	(6/87)
84.	Masada Corp.	58,293	(4/87)
85.	Galaxy Cablevision	56,462	(3/87)
86.	Chambers Communications Corp.	53,809	(3/87)
87.	Cardinal Communications	53,200	(2/87)
88.	Enstar Communications	53,024	(4/87)
89.	North American Comm. Corp.	50,616	(3/87)
90.	Tidel Communications	50,427	(4/87)
91.	Insight Communications	50,000	(2/87)
92.	Hearst Communications of California	49,447	(4/87)
93.	State Cable TV	48,861	(2/87)
94.	Helicon Corp.	48,000	(4/87)
95.	Joseph Gans Cable TV	46,532	(11/86)
96.	Commonwealth Cable Systems	45,900	(5/87)
97.	Dowden Cable	45,760	(4/87)
98.	New England Cablevision	45,395	(5/87)
99.	Donrey Cablevision	44,112	(4/87)
100.	CableAmerica	43,082	(1/87)

Subscriber counts are provided by MSOs and systems to ITCI. Figures will be updated quarterly. Send updates to CableVision, Attention Cable Stats, P.O. Box 5208-T.A., Denver, CO 80217.

Top 100 systems

Rank	Location	Operator	Basic subs	
1.	Woodbury (Long Island), NY	Cablevision Systems Corp.	282,000	(5/87)
2.	San Diego, CA	Cox Cable	279,179	(3/87)
3.	Manhattan, NY	ATC	229,907	(3/87)
4.	San Antonio, TX	Rogers	220,510	(3/87)
5.	East Orange, NJ	Maclean Hunter	189,917	(3/87)
6.	Houston, TX	Warner	184,926	(6/87)
7.	Honolulu, HI	ATC	180,882	(3/87)
8.	Puget Sound, WA	Viacom	175,000	(1/87)
9.	Phoenix, AZ	Times Mirror	157,615	(1/87)
10.	Cincinnati, OH	Warner	156,863	(6/87)
11.	Louisville/Jeff. Co., KY	Storer Communications	154,930	(2/87)
12.	Wayne, NJ	UA Cablesystems	154,622	(5/87)
13.	Englewood, CO	United Cable	154,165	(4/87)
14.	Rochester, NY	ATC	145,538	(3/87)
15.	Tulsa, OK	United Cable	145,350	(4/87)
16.	St. Louis Co., MO	Cencom Cable	145,172	(12/86)
17.	Hampton Roads, VA	Cox Cable	142,605	(3/87)
18.	Cherry Hills, NJ	NYT	140,105	(1/87)
19.	Fairfax, VA	Media General	139,000	(5/87)
20.	Atlanta, GA	Prime Cable Corp.	137,196	(3/87)
21.	Hartford Plainville, CT	United Cable	136,479	(2/87)
22.	Jacksonville, FL	Continental	136,000	(4/87)
23.	Kansas City, MO	ATC	129,788	(3/87)
24.	Baltimore County, MD	Comcast	128,552	(5/87)
25.	Buffalo, NY	Adelphia Communications	128,105	(4/87)
26.	Florida Division (Orlando/Ormond Beach)	ATC	128,100	(12/85)
27.	Erie County, NY	Adelphia	127,160	(3/87)
28.	Memphis/W. Memphis, TN	ATC	125,715	(3/87)
29.	Seattle, WA	Tele-Communications Inc.	125,000	(12/86)
30.	Manhattan, NY	Paragon Cable	125,000	(5/87)
31.	San Jose, CA	Gill Industries	119,100	(2/87)
32.	Charlotte, NC	ATC	118,791	(3/87)
33.	Long Island, NY	Viacom	112,000	(1/87)
34.	Austin, TX	ATC	111,537	(3/87)
35.	San Diego, CA	ATC	111,522	(3/87)
36.	San Francisco, CA	Viacom	106,500	(1/87)
37.	Pompano, FL	American Cablesystems	105,494	(5/87)
38.	Toledo, OH	Blade Communications	105,386	(4/87)
39.	San Juan, PR	ML Media Partners	104,823	(11/86)
40.	Warren, NJ	TKR	104,569	(6/87)
41.	Dallas, TX	Heritage	102,281	(5/87)
42.	Southeast Michigan	Comcast	100,031	(5/87)
43.	Jefferson Parish/Kenner, LA	Cox Cable	97,718	(3/87)
44.	Pinellas County, FL	Vision Cable	94,996	(4/87)
45.	Wilmington, DE	Heritage	94,645	(5/87)
46.	Grand Rapids, MI	UA Cablesystems	94,542	(5/87)
47.	Dade/Broward, FL	Storer	91,000	(2/87)
48.	Indianapolis, IN	Comcast	88,821	(5/87)
49.	Raleigh/Durham, N.C.	ATC	88,198	(3/87)
50.	Escondido, CA	Times Mirror	87,586	(1/87)
51.	Richmond, VA	Continental	86,866	(3/87)
52.	Pittsburgh, PA	Tele-Communications Inc.	85,000	(12/86)
53.	Jackson/Monroe, MS	ATC	82,500	(12/85)
54.	Oakland County, MI	United Cable	82,304	(2/87)
55.	Boston, MA	Cablevision	82,100	(5/87)
56.	Wichita, KS	Multimedia Cablevision	81,995	(5/87)
57.	Tacoma, WA	Viacom	80,500	(2/87)
58.	South Texas, TX	Heritage	79,981	(5/87)
59.	Flint, MI	Comcast Cable	79,812	(5/87)
60.	Milwaukee, WI	Warner	78,635	(6/87)
61.	Baton Rouge, LA	Daniels & Assocs.	77,879	(4/87)
62.	Akron, OH	Warner	76,668	(6/87)
63.	Las Vegas, NV	Prime	75,665	(3/87)
64.	Chicago, IL	Westinghouse Broadcasting	75,000	(4/86)
65.	New Orleans, LA	Cox Cable	74,614	(3/87)
66.	South Bend, IN	Heritage	74,321	(5/87)
67.	Greensboro, NC	ATC	74,100	(12/85)
68.	Santa Monica, CA	Century	74,000	(5/86)
69.	Nashville, TN	Viacom	74,000	(1/87)
70.	Allentown, PA	Service Elec.	74,000	(3/87)
71.	Dover, Morristown, NJ	Sammons	73,787	(5/87)
72.	Orange County, CA	Times Mirror	72,863	(1/87)
73.	Cleveland Heights, OH	Viacom	71,600	(1/87)
74.	Columbus, OH	Warner	70,984	(6/87)
75.	Medford Complex (Boston Suburbs), MA	Warner	70,659	(6/87)
76.	Fayetteville, NC	ATC	70,136	(3/87)
77.	Omaha, NE	Cox Cable	69,846	(3/87)
78.	Contra Costa Co. CA	Televents	69,474	(4/87)
79.	Harrisburg, PA	Sammons Communications	69,172	(5/87)
80.	Ocean County, NJ	Adelphia	68,851	(4/87)
81.	Little Rock, AR	Storer	68,393	(2/87)
82.	St. Petersburg, FL	Paragon Cable	68,000	(5/87)
83.	Des Moines, IA	Heritage	66,835	(5/87)
84.	Indianapolis,IN	ATC	66,674	(3/87)
85.	Albuquerque, NM	Jones Intercable	66,470	(7/87)
86.	Birmingham, AL	ATC	66,254	(3/87)
87.	Greater Bridgeport, CT	Cablevision Co.	65,800	(5/87)
88.	Lower Fairfield Co., CT	Cablevision Co.	65,600	(5/87)
89.	New Haven, CT	Storer	65,595	(2/87)
90.	El Paso, TX	Group W (ATC)	65,000	(5/87)
91.	Syracuse (suburbs), NY	NewChannels Corp.	64,847	(3/87)
92.	Oklahoma City, OK	Cox Cable	64,444	(3/87)
93.	Winston-Salem, N.C.	Summit	64,072	(4/87)
94.	Monterey, CA	Western Communications	63,815	(4/87)
95.	Sarasota, FL	Storer	63,207	(2/87)
96.	Lincoln, RI	Heritage	63,128	(5/87)
97.	Cook County, IL	Continental	63,000	(4/87)
98.	Madison, WI	Tele-Communications Inc.	63,000	(12/86)
99.	Westchester Co., NY	UA Cablesystems	62,804	(5/87)
100.	Santa Barbara, CA	Cox Cable	62,763	(3/87)